Symposium Graphical Real-Time Display

User Guide

Product release 1.1 Standard 1.01 June 1999

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User Guide

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June 1999 Standard 1.01. This release of the *Symposium Graphical Real-Time Display User Guide* includes updates to the configuration procedure.

April 1999 Standard 1.0. This is the first standard release of the *Symposium Graphical Real-Time Display User Guide.*

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Overview

Introduction

The *Symposium Graphical Real-Time Display User Guide* provides information on how to use the Symposium Graphical Real-Time Display (GRTD) product.

Who should read this guide

This guide is for Symposium Call Center supervisors, managers, and administrators who use the Symposium GRTD.

Assumptions

This guide assumes you have a Nortel Networks Symposium Call Center that has been correctly installed and is operational.

This guide also assumes that you have the required privileges and access rights to perform the procedures in this guide. If you connect to a Symposium Express Call Center, your user ID has these properties. If you connect to a Symposium Call Center Server, the user ID that you use to log in to the Symposium GRTD must be configured for desktop and call center supervisor capabilities. Also, your user ID must have access to real-time statistics and the call center database.

About the Symposium Call Center

When this guide refers to the Symposium Call Center, it is referring to either the Nortel Networks Symposium Call Center Server, Releases 1.1 and 1.5, or the Nortel Networks Symposium Express Call Center Release 1.0.

About the Symposium GRTD

Introduction

The Symposium GRTD is a software application that displays real-time statistics in a graphical format (for example, billboards or graphs). Symposium Call Center supervisors, managers, and administrators use this data to help them effectively manage call center activities.

GRTD and the Symposium Call Center

The Symposium GRTD receives real-time statistical data from the Symposium Call Center. To access this data, you log in to the Symposium GRTD using your Symposium Call Center user ID and password. The statistics are then converted and displayed in the format that you configure. You select a set of data elements and a presentation format. Together, these make up what is called a data window. The data within the data window is updated as conditions at the call center change.

You can choose to display several different data windows at the same time within the Symposium GRTD application window. A set of data windows is called a data window collection (or simply a collection).

Types of displays

There are three different data presentation formats: billboard, chart, and map.

Billboard

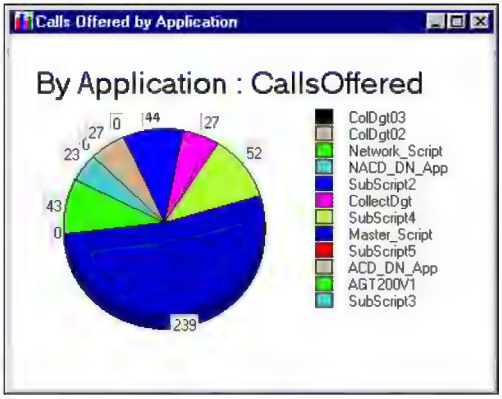
Billboard data windows

- consist of a single statistic in numeric format. The font is scalable, and large enough to fill the data window.
- allow supervisors to detect when statistics exceed defined thresholds. Supervisors can use the drilldown feature to isolate and resolve problems.

Chart

Chart data windows

- show a group of statistics in bar, pie, curve, or plot formats.
- allow for selective statistical performance charting in any of the following formats:
  - vertical or horizontal bar chart
  - pie chart
  - vertical or horizontal plot chart
  - time chart (for calls waiting over time for a skillset).
- allow supervisors to detect when statistics exceed defined thresholds. Supervisors can use the drilldown feature to isolate and resolve problems.



Map

Map data windows

- can be arranged to represent the physical layout of your call center.
- are based on position IDs, not agent IDs.
- allow supervisors to view the status and activity of individual agents. This gives supervisors the opportunity to isolate and resolve issues.
- feature drilldown for each position. Drilldown is predefined to show more information about the agent who logs in to the position.

Inside this guide

Introduction

The *Symposium Graphical Real-Time Display User Guide* is structured as follows:

Chapter 1, "Installing the Symposium GRTD," lists the hardware and software requirements that you must meet to install the software.

Chapter 2, "Configuring the Symposium GRTD," explains how to configure the Symposium GRTD after you install it.

Chapter 3, "Getting started," provides procedures to get you started with the Symposium GRTD. This chapter explains how to connect to the Symposium Call Center, and it describes the Collections Explorer.

Chapter 4, "Working with data windows," provides procedures for tasks that are general for all data window types.

Chapter 5, "Working with billboards and charts," provides procedures for tasks that are specific to billboard and chart data windows.

Chapter 6, "Working with maps," provides procedures for tasks that are specific to map data windows.

Appendix A, "Data sources," lists all of the available data sources for each type of data window.

Appendix B, "Troubleshooting," gives a list of possible error messages that you might encounter while working with the Symposium GRTD.

The **Glossary** defines terms used in this manual, as well as related terms.

Conventions

Introduction

This section describes the conventions used in this guide.

Choosing commands for procedures

As with many Windows applications, you can perform the same task for many of the procedures in this guide in several different ways. For example, to copy text, you can use any of the following methods:

- Choose Copy from the Edit menu.
- Click Copy on the Toolbar.
- Type the keyboard shortcut Ctrl + C.
- Right-click on the selection, and choose Copy from the context-sensitive menu.

Instructions in this guide use the menu method, and are presented in the following style: Choose Edit → Copy.

For the more complicated choices that arise from hierarchical menus, this guide extends the form. For example, if a procedure requires you to choose Italic from the Font menu, which is under the Format menu, this guide uses the following style:

Choose Format → Font → Italic.

About online Help

Types of online Help

Online Help includes information such as procedures for all tasks, as well as window and dialog box overview information.

Button descriptions

For information about a button on the toolbar, hold your mouse cursor over the button. A description of the button's function appears. These button descriptions are called ToolTips.

Accessing Help

You can access Help in the following ways:

- Press F1 on your keyboard.
- Select GRTD Help from the Help menu. Click Contents to view a list of Help topics.

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Installing the Symposium GRTD

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Overview

Introduction

This chapter describes

- the hardware and software requirements that your computer must meet to install the Symposium GRTD
- how the Symposium Call Center to which you connect must be configured to interact with the Symposium GRTD
- how to uninstall the Symposium GRTD

Minimum system requirements

Introduction

To successfully install the Symposium GRTD application, you need a Symposium Call Center and a computer with the specifications outlined in this section.

Operating system

The Symposium GRTD runs on all versions of Windows 95 and Windows NT Workstation 4.0.

Windows configuration

Configure your display settings for high color (16-bit) or higher. For more information about configuring Windows display settings, refer to your Windows documentation.

Connection speed

The network connection between the Symposium GRTD and the Symposium Call Center must be a high-speed connection. If the connection is slow (for example, due to distance, high traffic on the connection, or a slow modem connection), this may cause connection stability or data reliability problems.

Contact your system administrator for more information.

The Symposium Call Center client

You can install the Symposium GRTD on the same computer as the Symposium Call Center client. However, if you connect to a Symposium Express Call Center, you must not install the Symposium GRTD on the server computer.

Co-resident installations

When you install the Symposium GRTD on the same computer as the Symposium Call Center client, the configuration is referred to as client co-residency.

Stand-alone installations

You can also install the Symposium GRTD on a computer without the Symposium Call Center client. This is referred to as a stand-alone installation.

ATTENTION

At least one installation of the Symposium GRTD in your call center must be co-resident with a Symposium Call Center client. If you do not have a co-resident installation, you will not be able to obtain the agent data file. For more information, see "Configuring stand-alone installations" on page 15.

Hardware requirements

The following table lists the hardware you must have installed on your computer to install the Symposium GRTD. If you run other applications in addition to the Symposium GRTD, you require additional system resources.

	With the Symposium Call Center client	Stand-alone
Processor speed	Pentium 233 MHz	Pentium 166 MHz
RAM	64 Mbytes	32 Mbytes for Windows 95 64 Mbytes for Windows NT
Additional virtual memory	48 Mbytes	32 Mbytes
Available hard disk space	20 Mbytes for Symposium GRTD software and up to 20 Mbytes for additional software required by the Symposium GRTD	20 Mbytes for Symposium GRTD software and up to 20 Mbytes for additional software required by the Symposium GRTD

	With the Symposium Call Center client	Stand-alone
Monitor	17-inch color CRT monitor or 15-inch flat panel monitor able to support 800 × 600 SVGA resolution in 16-bit color (2 Mbyte video card)	15-inch color CRT monitor or 12-inch flat panel monitor able to support 800 × 600 SVGA resolution in 16-bit color (2 Mbyte video card)
Other hardware	Network interface card Windows-compatible mouse	Network interface card Windows-compatible mouse

Software compatibility

The Symposium GRTD uses Microsoft Access 7.0. If you have Microsoft Access on your computer, it must be version 7.0 to avoid conflict.

Symposium Call Center configuration

Introduction

This section explains how the Symposium Call Center to which you connect should be configured to interact with the Symposium GRTD. For more information on these topics, refer to your Symposium Call Center documentation.

Real-time displays

Ensure that for the statistics groups Agent, Skillset, Application, and Node, both moving-window and interval-to-date statistics are enabled.

Real-time display intervals

Some of the statistics you can view using the Symposium GRTD are gathered over an interval (that is, a defined period of time). For example, "Calls Answered" is the number of calls answered in a given interval. You must define this interval on the Symposium Call Center. An interval can be from 15 minutes to 24 hours long.

Note: The results that you receive immediately after you reset the interval may be inaccurate. Allow one full interval to pass to ensure the results are accurate.

To set the Symposium GRTD time

Some data windows display a time. The Symposium GRTD uses the same time settings as the computer on which it is installed. You must ensure that the time settings on the computer, the Symposium Call Center server, and the switch are all the same.

If you use the Symposium GRTD to view a call center in a different time zone, you must decide whether you want to change your computer time zone to match that of the server.

Symposium Call Center client licenses

Each active copy of the Symposium GRTD uses one client license on the Symposium Call Center. The maximum number of Symposium Call Center Server Releases 1.1 and 1.5 client license sessions is 100. The maximum number of Symposium Express Call Center client license sessions is 52.

Service level

You can view the current service level of your call center or applications within your call center. The service level value depends on the service level (answer and abandon delay) thresholds you set on the Symposium Call Center.

Installing the Symposium GRTD

Introduction

This section gives the following information:

- how to distribute the Symposium GRTD installation files
- how to share connection information among users of your call center

To install the software

To install the Symposium GRTD, refer to the instructions contained in the Readme file that accompanies the Symposium GRTD installation files.

ATTENTION

If you run the Symposium GRTD on the same computer as the Symposium client, install the Symposium client first.

Start menu shortcut

After you install the software, you can find the Start menu shortcut in Start → Programs → Nortel → GRTD 1.1.

To distribute the installation files

You can install the Symposium GRTD from a CD-ROM, or disk. To do so, copy the installation files from the Nortel Networks CD-ROM to a network drive, writable CD-ROM, or disk.

Sharing connection files

When to use

For the convenience of users who log in to the same Symposium Call Center, you can distribute the grtd.ini file with the installation files. This file contains the login information that you need to connect the Symposium Call Center.

To share connection files

1. Log in to the Symposium Call Center.

   Note: For more information, see "To start the Symposium GRTD" on page 24.

2. If you plan to share your grtd.ini file, do not check the Save Password box.

3. After you have successfully connected to the Symposium Call Center, choose File → Exit to close the Symposium GRTD.

4. Locate the grtd.ini file.

   Note: You can find it in the folder in which you installed the Symposium GRTD. For example, if you selected the default folder when you installed the Symposium GRTD, the path is

   C:\Program Files\Nortel\GRTD 1.1\grtd.ini

5. Create a copy of the grtd.ini file on a network drive or a diskette.

6. On each computer that you want to share the login information with, paste the grtd.ini file into the folder in which the Symposium GRTD is installed.

   Result: The next time you start the Symposium GRTD, the server information automatically appears in the Login dialog box.

   When users log in to the Symposium GRTD, they must enter their own user ID and password, and the IP address of their computer.

Uninstalling the Symposium GRTD

When to use

Follow the procedure in this section to remove all of the Symposium GRTD files from your computer.

Before you begin

The uninstall process removes all of the files from the Symposium GRTD folder. Before you uninstall the Symposium GRTD, copy and retain the following files for future use:

- **grtd.ini** This file contains the information you use to connect to the Symposium Call Center.
- **grtduser.mdb** This file contains all of your collections and data windows.
- **agentdata.mdb** This file contains the list of agents in the Symposium Call Center. If you connect to more than one call center, you should copy the agent list files for each call center. For more information, refer to "Connecting to more than one call center" on page 17.

If you reinstall the Symposium GRTD, you can replace these files in the folder in which the Symposium GRTD is installed.

To uninstall the Symposium GRTD

1. Shut down all applications running on the computer.
2. From the Windows Start menu, choose Settings → Control Panel.
3. Double-click Add/Remove Programs.

Add/Remove Programs Properties
Install/Uninstall
Windows Setup
Startup Disk
To install a new program from a floppy disk or CD-ROM drive, click Install.
Install...
The following software can be automatically removed by Windows. To remove a program or to modify its installed components, select it from the list and click Add/Remove.
Creative CD-ROM
Data Access Objects (DAO) 3.0
DD2 Matrox Version
Dial-Up Networking Upgrade 1.2
DirectX Drivers
Fonts for Minitel Emulation - HyperTerminal
FTP Explorer
GRTD 1.1
Guided Tour for Administrators
OK
Cancel

4 On the Install/Uninstall tab, select GRTD 1.1 from the list of applications.

5 Click Add/Remove.

Result: The Confirm File Deletion dialog box appears.

6 Click Yes.

7 If the uninstall program asks whether you want to remove shared files, click No.

8 Click OK.

9 Click Cancel to close the Add/Remove Programs Properties dialog box.

Upgrading the software

When to use

This is the first release of the Symposium GRTD. Currently, no upgrade for the Symposium GRTD software is available.

Software updates

When software updates become available, you do not need to uninstall the Symposium GRTD before you install the update.

When you install the software update over your current version of the Symposium GRTD, the installation does not overwrite the agentdata.mdb, grtduser.mdb, or grtd.ini files. However, Nortel Networks recommends that you back up these files before you install the update.

Chapter 2

Configuring the Symposium GRTD

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Overview

Introduction

Follow the procedures in this section to configure the Symposium GRTD after you install it.

What are stand-alone installations?

When you install the Symposium GRTD on a computer that does not have a Symposium Call Center client installed, it is referred to as a "stand-alone" installation. Follow the procedure in "Configuring stand-alone installations" on page 15.

What are co-resident installations?

When you install the Symposium GRTD on the same computer as the Symposium Call Center client, it is referred to as a co-resident installation.

You do not need to perform any additional configuration after a co-resident installation unless you connect to more than one Symposium Call Center.

ATTENTION

At least one installation of the Symposium GRTD in your call center must be co-resident with a Symposium Call Center client. If you do not have a co-resident installation, you will not be able to obtain the agent data file.

Connecting to more than one Symposium call center

If you need to view graphical real-time displays for more than one call center, follow the procedures in "Connecting to more than one call center" on page 17. Do not launch multiple copies of GRTD at once.

Note: You cannot install more than one copy of the Symposium GRTD on one computer to view multiple call centers.

Configuring stand-alone installations

When to use

If you install the Symposium GRTD on a computer that is not running the Symposium Call Center client, the Symposium GRTD does not receive information about agents, position IDs, or personal DNs from the server.

If the Symposium GRTD is installed on the same PC as a Symposium Call Center client, it automatically uses Sybase to retrieve agent information directly from the Symposium Call Center server. If the Symposium GRTD is installed on a PC without a Symposium Call Center client, there is no Sybase, so the Symposium GRTD retrieves this information from a local database file called agentdata.mdb. This file is located in the GRTD folder.

The agentdata.mdb file, when installed from the CD, is an empty database. It has no agent information in it. If you are not using map data windows, then this empty file will not affect you. However, if you use map data windows, then you must copy an agentdata.mdb file from a co-resident PC to the stand-alone PC.

If you want to put the agentdata.mdb file on a network drive for several stand-alone users to access, you must configure Sybase manually so it can locate the file on the network drive. For more information, see "To use a network drive to access agent data" on page 16.

To get agent information

1 On the computer that is running both the Symposium Call Center client and the Symposium GRTD, start and log in to the Symposium GRTD.

Note: For more information, see "To start the Symposium GRTD" on page 24.

2 When the busy icon (an hourglass) disappears, choose File → Exit to close the Symposium GRTD.

Note: When you close the application, the Symposium GRTD automatically creates a file named Agents.mdb. This file contains a list of agents in the call center. Performing steps 1 and 2 ensures that you are using the most up-to-date information.

3 Create a copy of the file named Agents.mdb on a network drive or diskette.

Note: You can find this file in the folder where you installed the Symposium GRTD. For example, if you selected the default folder when you installed the Symposium GRTD, the path is

C:\Program Files\Nortel\GRTD 1.1\Agents.mdb

4 Rename the copy of Agents.mdb to agentdata.mdb.

5 On the computer that is running the Symposium GRTD as a stand-alone installation, paste agentdata.mdb into the same folder where you installed the Symposium GRTD.

6 Click Yes to replace the current agentdata.mdb file.

Notes:

- Repeat this procedure every time agent information changes, or when you want updated personal DNs.

To use a network drive to access agent data

1 Ensure that the network drive is connected using the same drive letter each time you reboot your PC.

2 From the Windows Start menu, choose Settings → Control Panel.

3 Double-click ODBC (32bit) or ODBC Data Sources.

4 Select the System DSN tab.

5 Select GRTD_DSN.

6 Click Configure.

7 In the Database section, click Select.

8 Navigate to the agentdata.mdb file on the network drive.

9 Click OK three times to return to Control Panel.

Connecting to more than one call center

When to use

Follow the procedures in this section if you use the Symposium GRTD to connect to more than one Symposium Call Center. Then, each time you launch the Symposium GRTD, you can supply a new IP address, user ID, and password to connect to a different site in your organization.

IF your installation is	THEN follow the procedure
co-resident with the Symposium client	"For co-resident installations: Change the IP address in Sybase" on page 17
stand-alone	"For stand-alone installations: Get agent data" on page 18

Notes:

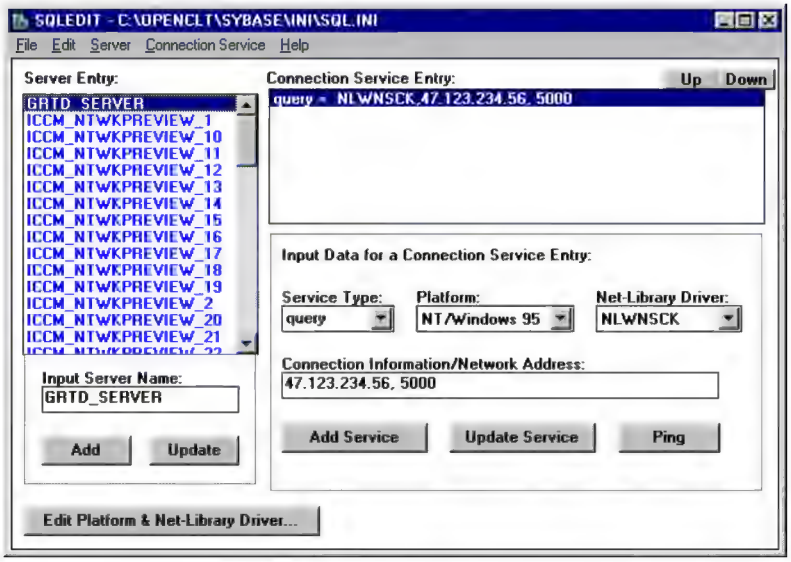
1. You cannot install more than one copy of the Symposium GRTD on one computer to view multiple call centers.
2. Do not launch multiple copies of GRTD at once.

For co-resident installations: Change the IP address in Sybase

When you install the Symposium GRTD, Sybase is automatically configured so that the Symposium GRTD retrieves information about agents in the Symposium Call Center each time you start the Symposium GRTD. The Symposium GRTD uses this information for map data windows.

During the installation, you enter the IP address of the Symposium Call Center to which you connect. If the IP address of the Symposium Call Center to which you connect changes, or if you connect to more than one call center, you must change the IP address in Sybase.

1 Choose Programs → Sybase SQL Server Professional → SQLEDIT from the Windows Start menu.



2 In the Server Entry field, select GRTD_SERVER.

3 In the Connection Information/Network Address field, change the IP address. Be sure to include ", 5000" after the IP address.

Example: 47.152.173.10, 5000

4 Click Update Service.

5 To test the connection you just configured, click Ping.

Result: You should see a message that the connection opened and closed sucessfully. If you do not, correct the settings and try again.

6 Choose File → Exit.

7 Click Yes to save your changes.

For stand-alone installations: Get agent data

1 On a computer that has both the Symposium Call Center client and the Symposium GRTD installed, start and log in to the Symposium GRTD.

Note: For more information, see "To start the Symposium GRTD" on page 24.

2 When the busy icon (an hourglass) disappears, choose File → Exit to close the Symposium GRTD.

Note: When you close the application, the Symposium GRTD automatically creates a file named Agents.mdb. This file contains a list of agents in the call center. Performing steps 1 and 2 ensures that you are using the most up-to-date information.

3 Create a copy of the file named Agents.mdb on a network drive or diskette.

Note: You can find this file in the folder where you installed the Symposium GRTD. For example, if you selected the default folder when you installed the Symposium GRTD, the path is

C:\Program Files\Nortel\GRTD 1.1\Agents.mdb

4 Rename the copy of Agents.mdb.

Note: Use a descriptive name (for example, agent_toronto.mdb or agent_new_york.mdb). This will help you distinguish the file from those of other servers later.

5 Repeat steps 1 to 4 for each server.

6 When you want to connect to a server, follow these steps:

a. Copy the agent file from the network drive or diskette to the folder where you have the Symposium GRTD installed.

b. Move or delete the existing file named agentdata.mdb from this folder.

c. Rename the new agent file to agentdata.mdb.

Note: Be sure to rename the copy, not the original.

Chapter 3

Getting started

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Overview

Introduction

This chapter explains how to get started with the Symposium GRTD. This chapter includes procedures to

- start the Symposium GRTD
- use the Collections Explorer
- create, rename, and delete collections
- share collections among users
- create, move, rename, delete, and print data windows
- save your work

Starting the Symposium GRTD

When to use

Follow the procedure in this section to start the Symposium GRTD and log in to the Symposium Call Center, and to change your login options.

ATTENTION

If you connect to a Symposium Call Center Server, the user ID that you use to log in to the Symposium GRTD must be configured for desktop and call center supervisor capabilities. Also, your user ID must have access to real-time statistics and the call center database. If you connect to a Symposium Express Call Center, your user ID has these properties.

Data update rate

You can indicate a data update rate from 2 to 60 seconds in the Login Options dialog box. Be aware, however, that the data update rate is limited by the speed at which the real-time interface (RTI) sends the statistics. Contact the Symposium Call Center administrator to determine the appropriate update rate.

User IDs and viewing agents

When you log in to the Symposium GRTD, you use the same user ID with which you log in to the Symposium Call Center client. When you view statistics, you see all data for all agents, skillsets, and applications defined on the Symposium Call Center.

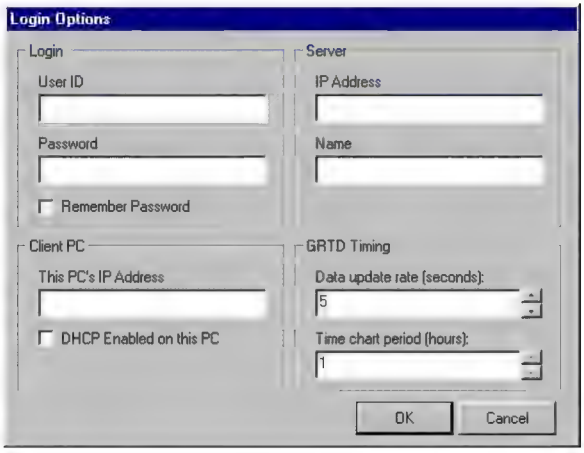
In the billboard and chart data windows, you can choose to view only a particular node, skillset, or application. If a skillset also contains agents from another supervisor, then the Symposium GRTD *does not* allow you to filter agents out.

Note: Some charts show statistics for all skillsets and applications, while others show statistics for a specific skillset or application.

In the map data windows, you add individual agent positions. In this way, you can create a view of any group of agents, whether or not you are the supervisor for the agents who log in to these positions. The Symposium GRTD does not check if you are the supervisor for the agents who log in to the positions you add to a map.

To start the Symposium GRTD

1 From the Windows Start menu, choose Programs → Nortel → GRTD 1.1 → GRTD 1.1.



2 Enter information in the following fields:

User ID: The user ID you use to log in to the Symposium Call Center.

Password: The password you use to log in to the Symposium Call Center.

Remember Password: Optional. Check whether to remember the password. If you select this option, you will not be prompted to log in when you start the Symposium GRTD.

Attention: Do not check Remember Password if security is an important consideration at your site. If you check this box, the Symposium GRTD does not ask for a password to connect to the Symposium Call Center.

IP Address: The IP address of the Symposium Call Center to which you want to connect.

Name: Optional. The name of the Symposium Call Center to which you want to connect. This does not have to match the name of the Symposium Call Center to which you connect. This name appears in the Collections Explorer.

This PC's IP Address: The IP address of your computer.

DHCP Enabled on this PC: Whether your computer uses DHCP. If you do not have this information, check with your system administrator.

Data update rate (seconds): The rate, in seconds, at which the Symposium GRTD receives data from the Symposium Call Center. The default is 5 seconds, and the maximum is 60 seconds.

Time chart period (hours): The width of the time chart axis. The minimum value you can enter is 0.5 hours. The maximum value is 120 hours (5 days). The default value is 1 hour.

The time chart contains 300 data points. If you set the time chart period to 0.5 hours then each point will represent the average value over the previous 6 seconds. If you set the period to 120 hours then each point will represent the average value over the previous 24 minutes.

3 Click OK.

Result: You are connected to the Symposium Call Center.

If a valid Symposium Call Center is not available at the given IP address, or the user ID and password are not valid, you are prompted again for the correct information. You cannot connect to the Symposium Call Center without the correct information.

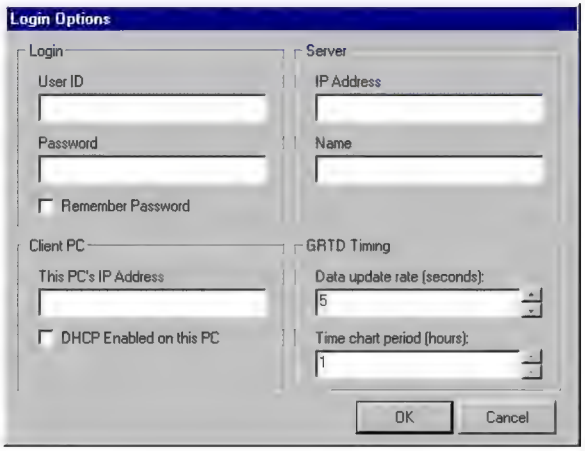
Changing your login options

When to use

Follow the procedure in this section to change your login options.

To change your login options

1 Choose View → Login Options.



2 Change the login information as required.

3 Click OK.

4 Close the Symposium GRTD, and log in using the new settings.

Using the Collections Explorer

Introduction

The Collections Explorer shows all of the user-defined collections and data windows on your system. When you start the Symposium GRTD, the Collections Explorer opens with each collection folder closed. To see the data windows inside a collection, click the plus sign next to the collection name.

Note: Collections display in the order in which they were created. They do not display alphabetically.

You can move the Collections Explorer anywhere within the Symposium GRTD window. You can resize the Collections Explorer by dragging the edges or corners. The Symposium GRTD remembers the size and position of the Collections Explorer window between sessions.

To open and close the Collections Explorer

To open or close the Collections Explorer, choose View → Collections Explorer.

By default, the Collections Explorer is open when you start the Symposium GRTD for the first time. After that, the Symposium GRTD remembers whether the Collections Explorer was open or closed the last time you closed the application and saves that setting. If you choose to show the Collections Explorer, it will always be in front when you launch the Symposium GRTD. You can then quickly select the collection you want to view.

Tip: If you cannot see the Collections Explorer, select View → Collections Explorer twice (if necessary) to bring the Collections Explorer window to the front.

To view collections and data windows

To view the data windows in a collection, click the collection's icon in the Collections Explorer.

Tip: To view a group of data windows from different collections, create a new collection and move the data windows you want to view into the new collection.

Note: You cannot copy data windows between collections.

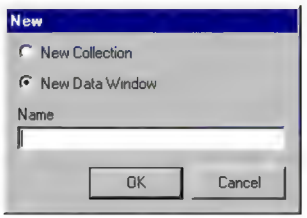
Adding collections

When to use

Follow the procedure in this section to add a new collection.

To add collections

1 In the Collections Explorer, choose File → New.



2 Select New Collection.

3 For Name, enter a name for the new collection.

4 Click OK.

Result: The new collection appears in the Collections Explorer as an empty collection. You can now add data windows to the collection.

Sharing collections among users

When to use

Follow the procedure in this section to provide copies of collections to users.

The Symposium GRTD saves the collection and data window configurations in a file called grtduser.mdb. You can find this file in the folder in which you installed the Symposium GRTD application. For example, if you selected the default folder when you installed the Symposium GRTD, the path is C:\Program Files\Nortel\GRTD 1.1\grtduser.mdb.

Tip: Each call center can assign the responsibility for defining the collections and data windows to one person. This person can then distribute copies of the grtduser.mdb file to other users whenever the definitions change.

To share collections

1. Shut down the Symposium GRTD.
2. Locate and rename the grtduser.mdb file on your computer.

   Example: grtduser_old.mdb
3. Copy the grtduser.mdb file that you want to use into the GRTD 1.1 folder.
4. Start the Symposium GRTD on your computer.

   Result: The new collections appear in the Collections Explorer.

Renaming collections

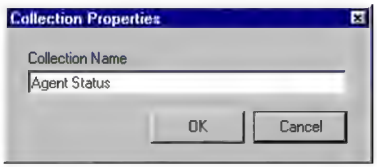
When to use

Follow the procedure in this section to change the name of a collection.

To rename collections

1 In the Collections Explorer, select the collection that you want to rename.

2 Choose View → Properties.



3 Enter a new name for the collection.

4 Click OK.

Deleting collections

When to use

Follow the procedure in this section to delete a collection.

ATTENTION This procedure permanently deletes the collection. There is no undo and no recycle bin.

To delete collections

1. In the Collections Explorer, select the collection you want to delete.
2. Choose File → Delete.
3. Click Yes to confirm that you want to delete the collection.

Saving your work

When to use

Follow the procedure in this section to save your collections and data windows.

To save the current configuration

To save the current configuration of the Symposium GRTD, choose File → Save.

The Symposium GRTD prompts you to save any unsaved changes when you close the application.

The Symposium GRTD saves the collection and data window configurations in a file called grtduser.mdb. You can find this file in the folder in which you installed the Symposium GRTD application.

Chapter 4

Working with data windows

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Overview

Introduction

This chapter provides information that is common for all types of data windows. This chapter includes procedures to

- add, move, and rename data windows
- view data window properties
- change the password to access the data window properties
- rename, print, and delete data windows

This section also gives a general overview of threshold levels.

For more detailed information about billboard and chart data windows, see Chapter 5, "Working with billboards and charts."

For more detailed information about map data windows, see Chapter 6, "Working with maps."

Data update rate

The Symposium GRTD receives real-time data from the Symposium Call Center every few seconds. You can set the data update rate to as often as every 2 seconds or longer, such as every 10 seconds. Therefore, when you add a new data window or change the properties of an existing data window, it may take a few seconds for the changes to display.

The minimum value you can enter is 2 seconds. The maximum value you can enter is 60 seconds.

Example

You have just added a position to a map, and the data update rate is set to 10 seconds. When an agent logs in to the position, it can take up to 10 seconds to see data for that agent.

Adding data windows

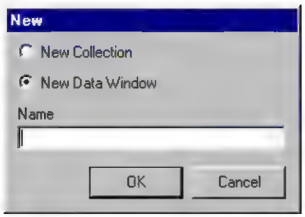
When to use

Follow the procedures in this section to

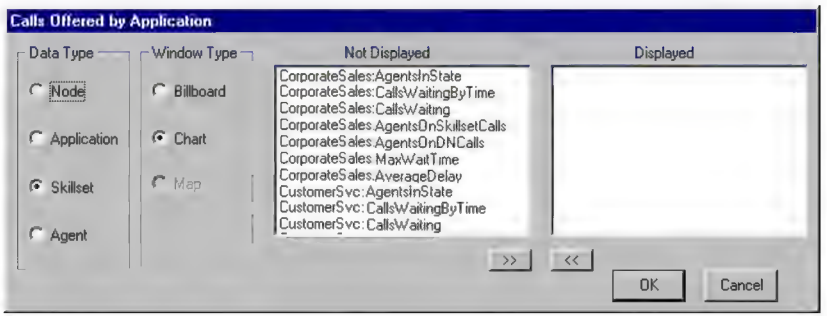
- create new data windows
- move data windows between collections
- resize data windows

To add data windows

1. In the Collections Explorer, select the collection to which you want to add a data window.
2. Choose File → New.



3. Select New Data Window.
4. For Name, enter a name for the new data window.
5. Click OK.



6 Choose a data type.

7 Choose a window type.

Note: The window types available vary depending on which type of data you selected in step 6.

IF you chose the data type...	THEN you can select...
Node	Billboard
Application	Billboard or Chart
Skillset	Billboard or Chart
Agent	Map

8 If you are adding a billboard or chart, select the data source you want to display from the Not Displayed area, then click the >> button.

Result: The data source appears in the Displayed list.

9 Click OK.

Result: The new data window appears.

To move data windows between collections

To move a data window from one collection to another, drag the data window icon in the Collections Explorer from its original collection to the destination collection.

Note: The data window retains all of its properties, including size and position.

To resize data windows

To resize a data window, choose one of the following methods:

- If you want to change the size of any data window and its contents, drag the edges or corner of the window frame. Items within the data window scale up or down accordingly.

- If you want to change the size of a map or vertical bar chart, but not the size of its contents, hold the Shift key while you drag the edges or the corner of the window frame.

Viewing data window properties

When to use

Follow the procedure in this section to view the properties of a data window.

Default password

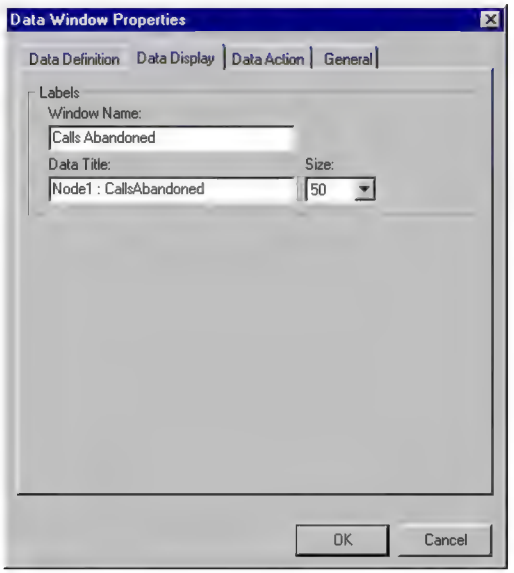
By default, there is no password protection for data window properties. To add password protection, see "Changing the password for data window properties" on page 41.

To view data window properties

1 Open the data window, or select its icon in the Collections Explorer.

2 Choose View → Properties.

3 If prompted, enter the password to access the data window properties, and click OK.



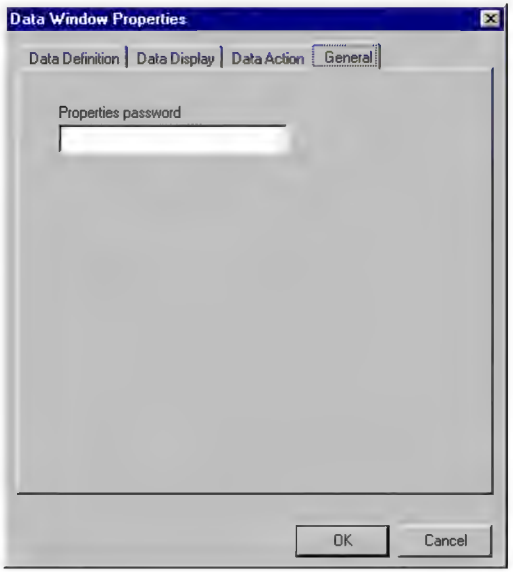
Changing the password for data window properties

When to use

Follow the procedure in this section to add password protection to the data window properties, or to change the password required to access data window properties.

To change the password for data window properties

1. Open the data window, or select its icon in the Collections Explorer.
2. Choose View → Properties.
3. If prompted, enter the password to access the data window properties, and click OK.
4. Select the General tab.



5 Enter a password in the Properties password field.

Note: By default, the Properties password field is blank. This means that there is no password protection to view data window properties.

6 Click OK.

Renaming data windows

When to use

Follow the procedure in this section to change the name of a data window.

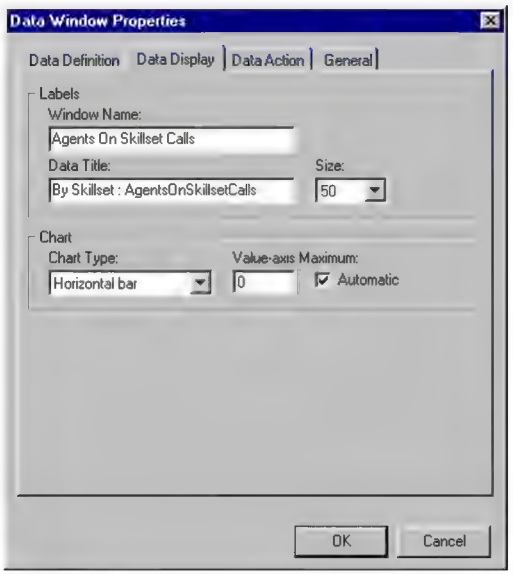
To rename data windows

1 Open or select the data window in the Collections Explorer.

2 Choose View → Properties.

3 If prompted, enter the password to access the data window properties, and click OK.

4 Click the Data Display tab.



5 In the Window Name field, enter a new name.

6 Click OK.

Changing data titles

When to use

Follow the procedure in this section to change the data title for a data window. The data title is the title that appears inside the data window.

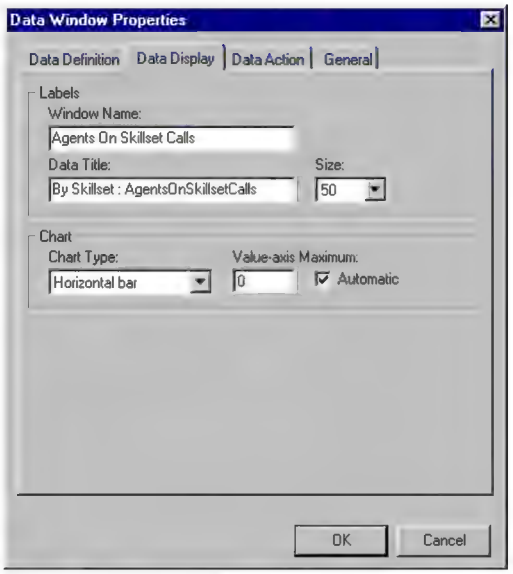
To change the data title

1 Open or select the data window in the Collections Explorer.

2 Choose View → Properties.

3 If prompted, enter the password to access the data window properties, and click OK.

4 Click the Data Display tab.



5 In the Data Title field, enter a new title.

6 Click OK.

Printing data windows

When to use

Follow the procedures in this section to print data windows. You can print one data window at a time in the Symposium GRTD, or you can print a view of several data windows using the Print Screen command.

To print a data window

1. Open or select the data window in the Collections Explorer.
2. Choose File → Print.
3. Click OK.

   Notes:

   - Only the *contents* of the selected data window print. This does not include the title bar and borders.
   - You can print only one data window at a time.
   - You cannot print to a file using the Print command. If you want to print to a file, use the standard Windows Print Screen functionality as described below, and choose Print to File on the Print dialog box.

To print a view of a collection

1. Arrange the data windows in the collection as you want them to appear on the printed page.
2. Press Alt + Print Screen.
3. Open a new document in your favorite graphics or word processing application, such as Microsoft Paint, Microsoft Word, or Microsoft PowerPoint.
4. Choose Edit → Paste.
5. Add text above or below the image, as desired.

   Note: This step is optional.
6. Choose File → Print.
7. Click OK.

Deleting data windows

When to use

Follow the procedure in this section to delete a data window.

ATTENTION This procedure permanently deletes the data window. There is no undo and no recycle bin.

To delete data windows

1. In the Collections Explorer, select the icon of the data window that you want to delete.
2. Choose File → Delete.
3. Click OK to confirm that you want to delete the data window.

   Result: The data window is permanently deleted.

Overview of defining thresholds

Overview

You can configure the Symposium GRTD to take special action if real-time data equals or exceeds a defined threshold.

For information about defining thresholds for billboards and charts, see "Defining thresholds for billboards and charts" on page 62.

For information about defining thresholds for maps, see "Defining thresholds for maps" on page 78.

Lower and upper levels

You can define two thresholds for each real-time display: a level 1 (lower) threshold and a level 2 (upper) threshold. This results in three operational levels.

- **Below level 1:** Normal call center operation. No action is required.
- **Between level 1 and level 2:** Action may be required to prevent call center performance from moving beyond acceptable operating levels.
- **Above level 2:** Current call center operation is beyond acceptable operative values. Immediate action is required.

Example

Imagine that you have a billboard display that shows how many calls are waiting to be answered. If you would like to be informed but not interrupted when the number of calls waiting exceeds 10, then set the level 1 threshold to 10, and the level 1 threshold action to Flash Taskbar Icon. If you would like to be informed and interrupted when the number of calls waiting exceeds 15, then set the level 2 threshold to 15 and the level 2 threshold action to Bring GRTD to Front.

Threshold actions

For billboard and chart data windows, you can set color and one action for each threshold level.

The following table lists the threshold actions that you can set for each type of data window.

	Billboard	Chart	Map
None (default)	Yes	Yes	Yes
Flash Data	Yes	—	Yes
One System Beep	Yes	Yes	—
Continuous System Beep	Yes	Yes	—
Flash Taskbar Icon	Yes	Yes	—
Bring GRTD to Front	Yes	Yes	—

If you choose Flash Data, Continuous System Beep, or Flash Taskbar Icon, the action continues for as long as the threshold condition exists. For example, imagine you choose Flash Taskbar Icon when the number of calls waiting exceeds 15. If this threshold is met, the Symposium GRTD icon on your taskbar flashes on and off for as long as there are 15 or more calls waiting. When the number of calls waiting falls below 15, then the icon stops flashing.

You can set different thresholds and threshold actions for each data window. Each data window triggers threshold actions independently of other data windows. For example, imagine that you have five billboards, each with a threshold action of one system beep. If the data in three of the five data windows exceed their thresholds at the same time, you hear three system beeps.

Chapter 5

Working with billboards and charts

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Choosing skillsets and applications 66

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Overview

Introduction

This chapter provides procedures for tasks that only apply to billboard and chart data windows.

Adding billboards

When to use

Follow the procedure in this section to add billboard data windows.

To add billboards

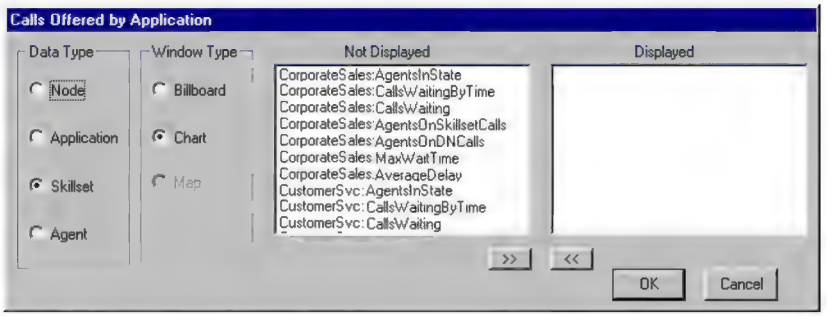
1 In the Collections Explorer, select the collection to which you want to add the billboard.

2 Choose File → New.

3 Select New Data Window.

4 For Name, enter a name for the new data window.

5 Click OK.



6 For Data Type, choose Node, Application, or Skillset.

7 For Window Type, choose Billboard.

8 In the Not Displayed list, select the data source you want to use in this data window, then click the >> button.

Result: The data source appears in the Displayed list.

Note: If you chose Skillset for data type, only the skillsets with logged in agents appear in the Not Displayed list.

9 Click OK.

Changing billboard display properties

When to use

Follow the procedure in this section to change the appearance of a billboard data window.

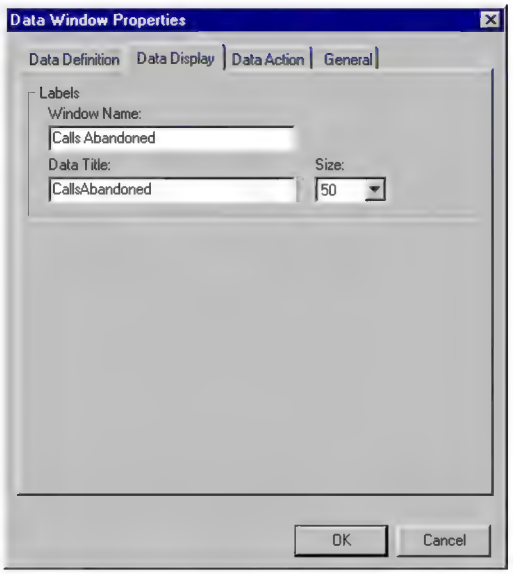
To change billboard display properties

1 Open the billboard, or select its icon in the Collections Explorer.

2 Choose View → Properties.

3 If prompted, enter the password to access the data window properties, and click OK.

4 Click the Data Display tab.



5 Enter information in the following fields:

Window Name: Enter a name for the window. This name appears in the data window title bar.

Data Title: Enter the title for the billboard. This title appears inside the billboard.

Size: Select the font size for the data title. Reduce the font size, or leave the Data Title field blank, if your chart is too crowded in the data window.

6 Click OK.

Adding charts

When to use

Follow the procedures in this section to add chart data windows.

To add charts

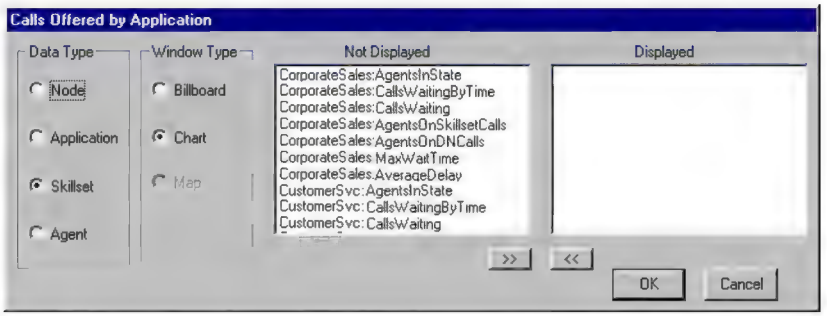
1 In the Collections Explorer, select the collection to which you want to add a chart.

2 Choose File → New.

3 Select New Data Window.

4 For Name, enter a name for the new data window.

5 Click OK.



6 For Data Type, choose Application or Skillset.

7 For Window Type, choose Chart.

8 In the Not Displayed list, select the data source you want to use in this data window, then click the >> button.

Result: The data source appears in the Displayed list.

Note: If you chose Skillset for data type, only the skillsets with logged in agents appear in the Not Displayed list.

9 Click OK.

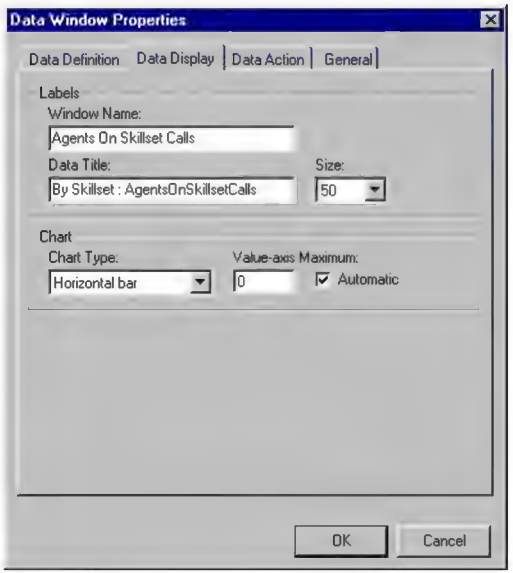
To select a chart type

1 Open or select the chart data window in the Collections Explorer.

2 Choose View → Properties.

3 If prompted, enter the password to access the data window properties, and click OK.

4 Click the Data Display tab.



5 For Chart Type, select Horizontal bar, Vertical bar, Horizontal plot, Vertical plot, or Pie from the drop-down list.

6 Click OK.

Working with time charts

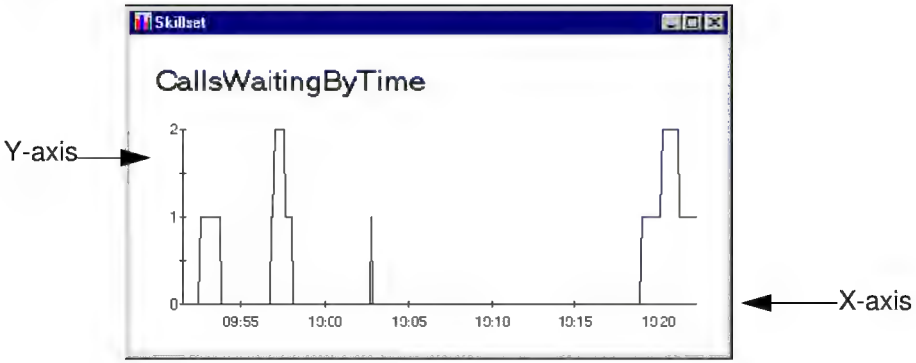
Overview

Time charts plot the average number of calls waiting for a skillset during the time represented by a data point on the chart.

You can use time charts to

- View the average number of calls that were waiting for skillsets at various times of the day.
- Help you schedule the number of agents you need in each skillset at different times of the day.

Using time charts



The Y-axis shows the average number of calls waiting for the skillset.

The X-axis shows the time, in 24-hour format.

In this example, you can see that between 9:55 and 10:00 a.m., there was an average of 2 calls waiting.

Setting the time interval on the chart

You set the period of time represented on the time axis when you log in. The time chart contains 300 data points. The width of the axis is the value you enter in the Time Chart Period field of the Login dialog box, divided by 300.

Example

If you set the time chart period to 0.5 hours, then each point will represent the average value over the previous 6 seconds. This is the formula that the Symposium GRTD uses to calculate the time chart period:

(0.5 hours * 3600 seconds per hour)/300

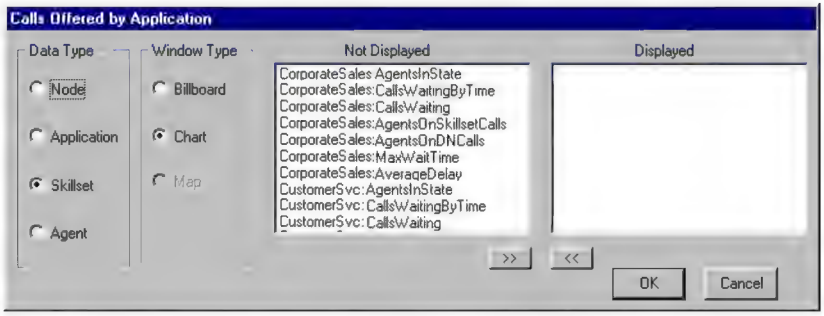
If you set the period to 120 hours, then each point will represent the average value over the previous 24 minutes. This is the formula that the Symposium GRTD uses to calculate the time chart period:

(120 hours * 60 minutes per hour)/300

For information about changing your login options, see "Changing your login options" on page 26.

To add a time chart

1. In the Collections Explorer, select the collection to which you want to add a chart.
2. Choose File → New.
3. Select New Data Window.
4. For Name, enter a name for the new data window.
5. Click OK.



6 For Data Type, choose Skillset.

7 For Window Type, choose Chart.

8 In the Not Displayed list, select (SkillsetName):CallsWaitingByTime, then click the >> button, where SkillsetName is the skillset for which you want to view statistics.

Result: (SkillsetName):CallsWaitingByTime appears in the Displayed list.

9 Click OK.

Result: The new chart appears.

Changing chart display properties

When to use

Follow the procedure in this section to change the appearance of a chart data window.

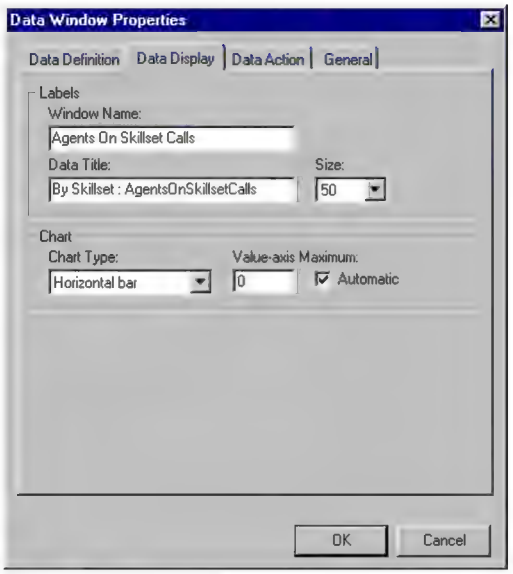
To change chart display properties

1 Open the data window, or select its icon in the Collections Explorer.

2 Choose View → Properties.

3 If prompted, enter the password to access the data window properties, and click OK.

4 Click the Data Display tab.



5 Enter information in the following fields:

Window Name: Enter a name for the window. This name appears in the data window title bar.

Data Title: Enter the title for the chart. This title appears inside the data window, above the chart.

Size: Select the font size for the data title. Reduce the font size, or leave the Data Title field blank, if your chart is too crowded in the data window.

Value-axis Maximum: Enter the highest value for the x-axis.

Select Automatic to automatically adjust the maximum axis value.

Chart Type: Select the type of chart you want to create.

6 Click OK.

Zooming in on charts

When to use

Follow the procedures in this section to see a more detailed view of the information in a bar or plot chart. Zooming in on a chart gives you a close-up, detailed view of information that may be crowded or overlapping in the normal view.

When you follow the first procedure in this section, the axis labels appear in the enlarged view of the chart. If you follow the second procedure in this section, only the section of the chart that you select is enlarged.

To include axis labels when you zoom in

1. Press and hold the Shift key.
2. Starting slightly to the left of the Y-axis or below the X-axis, click and drag your mouse over the area that you want to enlarge.
3. Release the mouse button, then the Shift key.

   Result: The area of the chart that you selected is enlarged.
4. To return to the normal view, press R on your keyboard.

To zoom in on chart data only

1. Press and hold the Ctrl key.
2. Click and drag your mouse over the section of the chart that you want to enlarge.
3. Release the mouse button, then the Ctrl key.

   Result: The area of the chart that you selected is enlarged.
4. To return to the normal view, press R on your keyboard.

Defining thresholds for billboards and charts

When to use

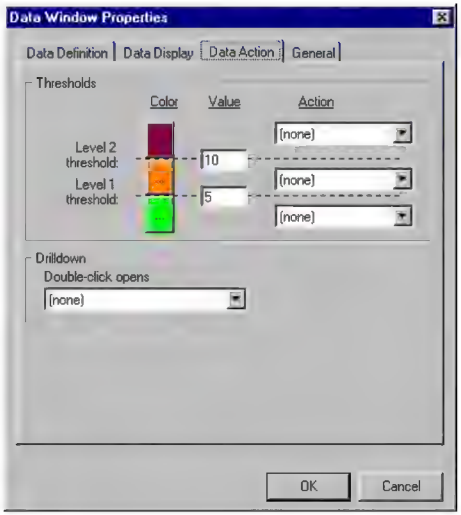
Follow the procedure in this section to define thresholds for billboard and chart data windows.

For more information about defining thresholds, see "Overview of defining thresholds" on page 47.

To define thresholds for billboards and charts

1. Open the data window, or select its icon in the Collections Explorer.
2. Choose View → Properties.
3. If prompted, enter the password to access the data window properties, and click OK.
4. Click the Data Action tab.

   Note: This example shows the billboard data action properties. The Data Action property page is different for different types of data windows.



5 To change the color for a threshold level, click the color block for the threshold.

6 For Value, enter the lower and upper threshold values.

Note: If you do not want to use thresholds, enter 0.

7 For Action, choose an action from the drop-down list for each of the threshold areas.

8 Click OK.

Setting drilldown properties

Overview

You can set the drilldown properties for a billboard or chart data window so that when you double-click within the window, another collection that shows more detailed information opens.

Note: When you drill down in a map data window, you see information about the agent who is logged in to the position that you double-click. For more information, see "Map drilldown information" on page 77.

Example

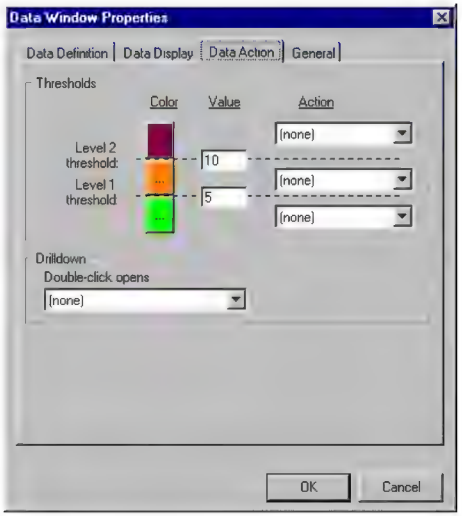
For a data window that shows information about skillsets, you can set the drilldown properties to show you information about the agents in that skillset. If you notice, for example, that a significant number of calls are waiting for the skillset, you can double-click the data window to see a collection that shows agent status information.

To drill down

To drill down on a data window, double-click it. When you double-click a data window, the collection that you define in the data window properties opens.

To set drilldown properties

1. Open or select the data window in the Collections Explorer.
2. Choose View → Properties.
3. If prompted, enter the password to access the data window properties, and click OK.
4. Click the Data Action tab.



5 For Double-click opens, choose a collection from the drop-down list.

6 Click OK.

Result: If the collection defined in your drilldown no longer exists, then you receive a message when you double-click the item.

7 Use the Collections Explorer to return to the original collection after drilling down on an item.

Choosing skillsets and applications

When to use

Use the Data Source Selector on the toolbar to select the skillset or application for which you want to view real-time displays. You can use the Data Source Selector with billboard and chart data windows that display statistics for a specific skillset or application.

The Data Source Selector shows a list of applications or skillsets according to the choice you made when you created the data window.

Example

You have a billboard data window that displays the number of calls waiting for a skillset. Currently, you are viewing the calls waiting for the English Sales skillset. You can use the Data Source Selector on the toolbar to view the calls waiting for the French Sales skillset instead.

To use the Data Source Selector

1 Open or select the data window in the Collections Explorer.

2 On the toolbar, select a skillset or application from the Data Source Selector drop-down list.

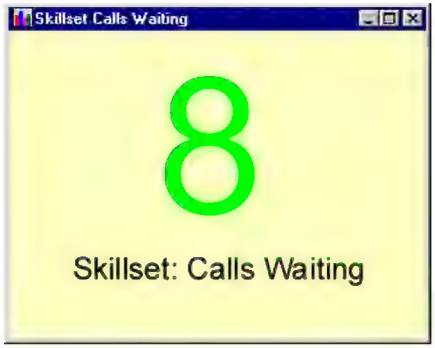
Result: The data window displays real-time information for the newly selected application or skillset.

Default data titles

When you create a data window, the Symposium GRTD applies a default data title to the display. For example, if you create a billboard data window that shows the number of calls waiting for a skillset, the default data title shows

- the skillset that you selected when you created the data window
- the statistic calls waiting

If you use the Data Source Selector to view another skillset, the data title does not change, and is therefore incorrect. You might want to change the title of the data window to be more generic. For example, instead of using the name of a skillset, just use the word skillset.



Viewing data sources

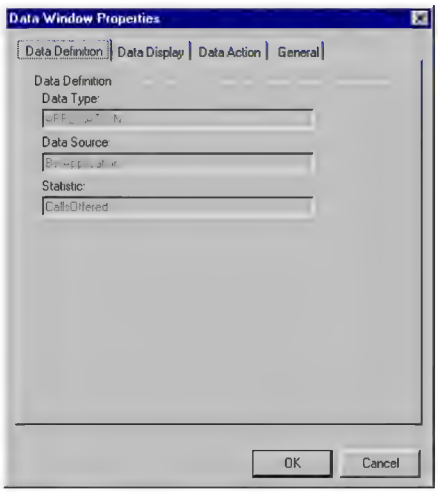
When to use

Follow the procedure in this section to view the data source for a billboard or chart data window. You cannot change the data source using this procedure, but you might find it useful in one of the following situations:

- The name of the window is not descriptive, and you are not sure what real-time statistic a data window is showing.
- You have hidden the toolbar (by choosing View → Toolbar), and you cannot see which application or skillset is selected in the Data Source Selector.

To view data sources

1. Open or select the data window in the Collections Explorer.
2. Choose View → Properties.
3. If prompted, enter the password to access the data window properties, and click OK.
4. Click the Data Definition tab.



Chapter 6

Working with maps

In this chapter

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Defining thresholds for maps 78

Overview

Introduction

This chapter provides procedures for tasks that only apply to map data windows. For more information about billboard and chart data windows, see Chapter 5, "Working with billboards and charts."

Map data windows

A map data window provides a view of as many agents in your call center as you configure. When you create a map, you can arrange position blocks as the agents' desks are physically located in your call center.

The map view shows the state of the chosen agent positions as a color-coded block containing text that can include the agent name and time in state, and one of position ID, (agent) login ID, agent personal DN, or none.

What are positions?

A position is a number that identifies a phoneset in the call center. Agents can log in to any phoneset in the call center. When you add a position to a map, it remains blank until an agent logs in to the phoneset. When an agent logs in to the phoneset, information about the agent appears in the position block.

When you open a map, the position blocks fill in as the Symposium GRTD receives information from the Symposium Call Center. The position block reflects the current agent state. As agents change state, the position blocks in the map update. When an agent logs in to a position, the change is reflected on the map.

About the time in state statistic

The time in state statistic reflects the amount of time that the agent has maintained his or her current status. When an agent changes state, the time in state resets to zero and begins incrementing again in one-second increments.

Note: On the Symposium Call Center, an agent's time in state is a combination of the following three types of timers: In-Calls key, DN-In, and DN-Out. The Symposium GRTD only shows the time in state for the In-calls key timer.

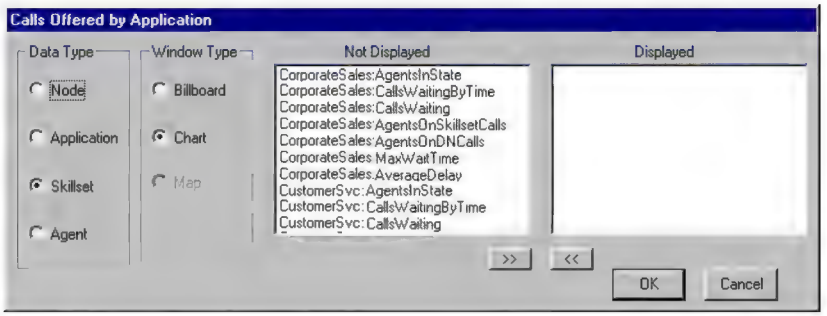
Adding maps

When to use

Follow the procedure in this section to add a map data window.

To add maps

1. In the Collections Explorer, select the collection to which you want to add a map.
2. Choose File → New.
3. Select New Data Window.
4. For Name, enter a name for the new data window.
5. Click OK.



6. For Data Type, select Agent.
7. For Window Type, select Map.
8. Click OK.

   Result: The new map data window appears. The map is empty until you add positions to it.

Adding positions to maps

When to use

Follow the procedures in this section to add agent positions to map data windows.

To add positions to maps

1 Open the map data window.

2 Right-click on the area in the map data window where you want the position to appear.

3 Choose Add Position.

4 Enter a position ID number.

5 Click Add.

Result: GRTD adds the position. When an agent logs in to this position, you see his or her status and the other information (name, time in state, and so on) that you configured for display. For more information about configuring information for display, see "Configuring map display properties" on page 75.

To move positions

You can drag and drop positions anywhere within a map data window.

Tip: To help you line up positions neatly, the position snaps to an invisible grid when you drop the block. You can arrange positions so that they overlap each other.

Notes:

- You can move positions at any time, even while there is traffic in your call center.
- You cannot move positions between map data windows.

To move a position to an area of the map data window that has scrolled out of the visible window area, follow these steps.

1 Right-click the position.

2 Choose Cut Position.

3 Scroll to the area of the map data window where you want to place the position.

4 Right-click and choose Paste Position.

To remove positions

1 Right-click the position you want to remove.

2 Choose Delete Position.

Configuring map display properties

When to use

Follow the procedures in this section to change the appearance of a map data window.

Map properties apply to all positions within the map. Each map data window has its own set of properties.

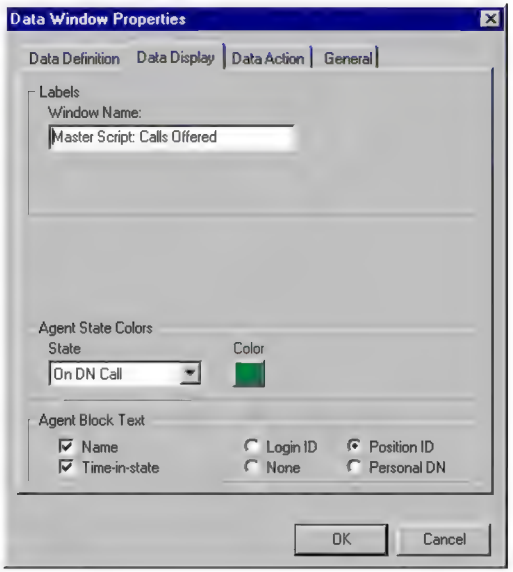
To configure map display properties

1 Open or select the map in the Collections Explorer.

2 Choose View → Properties.

3 If prompted, enter the password to access the data window properties, and click OK.

4 Click the Data Display tab.



5 In the Window Name field, enter the name of the map as you want it to display in the title bar and in the Collections Explorer.

6 For Agent State Colors, define the colors you want for each agent state. Follow these steps:

   a. Select an agent state from the State drop-down list.

   b. Click the Color button.

   c. Select a color from the palette.

   d. Click OK.

7 In the Agent Block Text section, choose the information you want to appear in each position.

   Note: By default, the agent's name, time in state, and position ID display.

To resize a map

You can resize a map the same way as any other data window. The contents resize proportionately. To do so, choose one of the following steps:

1 To change the size of a map and its contents, drag the edges or corner of the window frame. Items inside the map scale up or down accordingly.

2 To resize the map but not the contents of the map, hold the Shift key while you drag the edges or corner of the window frame. If this obscures data, use the scroll bars to rearrange your data.

If you make the map very small, the text in the positions disappears. However, the colors of the blocks are still active, showing the agent states. To view the details, hold the mouse over the position. Information about the agent appears in a pop-up window.

You can add new positions to a resized window. The new position is the same size as the existing positions. The grid that the Symposium GRTD uses to arrange the agent positions scales proportionately as you resize.

Viewing agent details

When you decrease the size of a map data window, the text inside agent positions can become too small to read, or the text can disappear. To view pop-up information about a position, hold the mouse over the block and pause. You see the same information that is displayed in text within the position when the map data window is larger.

Map drilldown information

To drill down on a position, double-click the block. You see the following information:

- agent name
- login ID
- personal DN
- position ID
- agent state
- skillset
- time in state
- supervisor's name
- supervisor's DN

Defining thresholds for maps

When to use

Follow the procedure in this section to define the thresholds for map data windows. For map data windows, you can choose No Action or Flashing Text.

For more information about thresholds, see "Overview of defining thresholds" on page 47.

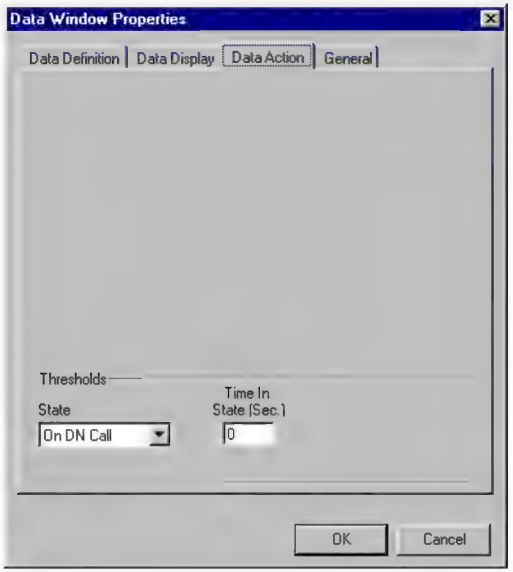
To define thresholds for maps

1 Open or select the map in the Collections Explorer.

2 Choose View → Properties.

3 If prompted, enter the password to access the data window properties, and click OK.

4 Click the Data Action tab.



5 Choose the amount of time after which you want the text to flash. Follow these steps:

   a. From the State drop-down list, choose an agent state.

   b. For Time In State (Sec.), enter the time, in seconds.

   Note: If you do not want a threshold, enter 0.

   c. Repeat steps a and b for each agent state.

6 Click OK.

Appendix A

Data sources

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Map data definitions 89

Overview

Introduction

This appendix lists the data sources that you can use for each type of data window.

Billboard data definitions

Billboard data

The following table lists the statistics that are available for use with billboard data windows.

Statistic	Node	Application	Skillset	Details
Calls waiting	Yes	Yes	Yes	The total number of calls currently waiting in the queue.
Calls answered	Yes	Yes	—	The number of calls answered by agents so far during the interval.
Calls offered	Yes	Yes	—	The number of calls offered to the queue so far during the interval.
Calls abandoned	Yes	Yes	—	The number of calls abandoned before reaching an agent so far during this interval. **Note:** For Node, this includes Calls Terminated.
Calls terminated	Yes	Yes	—	The number of calls that were terminated by one of the following treatments: ■ Force Busy ■ Force Overflow ■ Force Disconnect ■ Route To ■ Default ■ Transferred in an IVR session ■ Networked to an NACD queue

Statistic	Node	Application	Skillset	Details
Max wait time	Yes	Yes	Yes	The wait time of the oldest call currently in the node, application, or skillset queue. The Symposium GRTD displays this information in hh:mm:ss format. The maximum value that the Symposium GRTD can display is 23:59:59.
Average delay	Yes	Yes	Yes	The average wait time of calls currently in the node, application, or skillset queue. The Symposium GRTD displays this information in hh:mm:ss format. The maximum value that the Symposium GRTD can display is 23:59:59.
Average answer delay	Yes	Yes	—	The average time taken to answer calls in the application or node so far in this interval. The Symposium GRTD displays this information in hh:mm:ss format. The maximum value that the Symposium GRTD can display is 23:59:59.
Service level (%)	—	Yes	Yes	The percentage of calls answered within a defined wait time or delay.
Agents on skillset calls	Yes	—	Yes	The number of agents currently on a skillset call.
Agents on DN calls	—	—	Yes	The number of agents currently on inbound or outbound DN calls.
Agents logged in	—	—	Yes	The number of agents logged in to the skillset.

Statistic	Node	Application	Skillset	Details
Agents not ready	—	—	Yes	The number of agents logged in to the skillset who are currently in the Not Ready state.
Agents idle	—	—	Yes	The number of agents logged in to the skillset who are currently waiting for a call.

Chart data definitions

Chart data

The following table lists the statistics that are available for use with chart data windows.

Statistic	Application	Skillset	Details
Calls waiting	Yes	Yes	The number of calls currently waiting in each application or skillset.
Calls answered	Yes	—	The number of calls answered by agents so far during the interval in each application.
Calls answered (%)	Yes	—	The percentage of calls offered that were answered at each application.
Calls offered	Yes	—	The number of calls offered at each application so far during the interval.
Calls abandoned	Yes	—	The number of calls abandoned so far during this interval period in each application.
Calls abandoned (%)	Yes	—	The percentage of calls offered that were not answered so far in this interval period per application.
Calls waiting (time)	—	Yes	The average number of calls waiting during the time represented by a data point in a time chart.

Statistic	Application	Skillset	Details
Calls terminated	Yes	—	For each application, the number of calls that were terminated by one of the following treatments: ■ Force Busy ■ Force Overflow ■ Force Disconnect ■ Route To ■ Default ■ Reached a non-ISDN trunk while being routed to a remote site ■ Transferred in an IVR session ■ Networked to an NACD queue
Max wait time	Yes	Yes	The wait time of the oldest call currently in the application or skillset.
Average delay	Yes	Yes	The average wait time of calls currently in the application or skillset queue.
Service level (%)	Yes	Yes	The percentage of calls answered within a defined wait time or delay on each application.
Agents on skillset calls	—	Yes	The number of agents currently on a skillset ACD call in each skillset.
Agents on DN calls	—	Yes	The number of agents currently on DN calls, inbound or outbound, in each skillset.

Statistic	Application	Skillset	Details
Agents in state	—	Yes	Agent states on x-axis. Supported states are ■ Logged out ■ Not Ready ■ Idle ■ On Skillset calls ■ On DN calls **Note:** When agents are in Busy state, they temporarily disappear from the chart until they change to another state.

Map data definitions

Map data

The following table lists the statistics that are available for use with map data windows.

Statistic	Agent	Details
Agent Name	Yes	The name of the agent (last name, first name).
Agent DN	Yes	The personal or private DN of the agent.
Agent Login ID	Yes	The login string used by the agent.
Position ID	Yes	The position ID of the agent.
Agent state	Yes	The state of the agent: ■ Logged out ■ Busy ■ On Skillset Call ■ On DN Call ■ Idle ■ Not Ready
Time in state	Yes	How long the agent has been in the current state. The Symposium GRTD displays this information in hh:mm:ss format. The maximum value that the Symposium GRTD can display is 23:59:59.
Supervisor name	Yes	The name of the agent's primary supervisor. This statistic appears only when you drill down on a map.

Appendix B

Troubleshooting

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List of possible errors

Introduction

This appendix provides a list of errors that you may receive when you use the Symposium GRTD. If you consistently receive any other error, contact your Nortel Networks customer representative.

List of errors

- Invalid server ID passed. Check the server IP address and test the LAN connection.
- Invalid user ID passed. Ensure that the user ID is defined on the SCCS server.
- Invalid password passed. Try again, and make sure CAPS lock is not on.
- Too many users logged in to the server. You may have exceeded your limit of clients on the SCCS Server.
- General login failure. Check the server IP address and test the LAN connection.
- Invalid update rate passed. Replace your copy of GRTD.INI with one from another PC.
- Failed to initialize authorization structure. GRTD or Autoprog may already be running. Check tasklist.
- Failed to initialize the server structure. GRTD or Autoprog may already be running. Check tasklist.
- Failed to log in to the server due to the real-time access feature not having been purchased.
- A communications failure occurred.
- Failed in DP. Check that node, skillset, application and agent statistics are set for interval-to-date on SCCS Server.
- No EULA (end-user licence agreement). Check that the SCCS Server licence allows real-time statistics.
- Failed server version. Ensure that the server is version SCCS 1.1.

Glossary

agent

1. A person who is responsible for accepting incoming calls.
2. One of four possible sources of statistics.

agent ID

A unique identification number assigned to a particular agent. The agent uses this number when logging in. The agent ID is not associated with any particular phoneset.

agent position ID

A number that identifies a phoneset in the call center. Agents can log in to any phoneset in the call center. When you add a position to a map, it remains blank until an agent logs in to the phoneset. When an agent logs in to the phoneset, information about the agent appears in the position block.

application

In the Symposium Call Center, applications are used for the purposes of reporting. Information is collected to give call center managers specific details about call types, callers, or conditions. The master script and each primary script have an application with the same name. Applications are created automatically when the master script is activated for the master script and for every primary script that the master script references.

billboard

A data window that consists of a number displayed in a large font size.

chart

A type of data window that consists of data shown in a, pie, curve, line, or vertical or horizontal bar chart.

CLAN

Customer LAN. The Symposium GRTD R1.1 uses a CLAN.

collection

A user-definable grouping of data windows that can include a combination of charts and billboards from four data sources (node, applications, skillsets, and agent). You can save your favorite combination of data windows (billboards and charts) in a collection. When you open a saved collection, all of the data windows automatically display.

Also called a data window collection.

Collections Explorer

A tree view of all data windows and collections.

co-resident installation

When you install the Symposium GRTD on the same computer as the Symposium Call Center client, it is referred to as a co-resident installation.

data collection

A user-definable grouping of data windows that can include a combination of charts and billboards from four data sources (node, applications, skillsets, and agent). You can save your favorite combination of data windows (billboards and charts) in a collection. When you open a saved collection, all of the data windows automatically display.

data window

A window that displays real-time data in a specified format.

DHCP

Dynamic Host Configuration Protocol, an industry-standard protocol designed to reduce the complexity of TCP/IP network administration. Computers receive IP addresses and other configuration information from the DHCP server when the computers boot up. Instead of locating the client by IP address, the Symposium Call Center Server uses the computer name.

drilldown

An action (double-clicking) taken to get more detailed information about an item.

ELAN

Embedded LAN. Symposium GRTD R1.1 does not use an ELAN.

GRTD

See Symposium GRTD.

map

A type of data window that consists of icons that can be configured in a two-dimensional landscape. The icons display dynamic information.

network skillset

A skillset that applies to more than one Symposium Call Center. A call queued to a network skillset can be answered by an agent from any of these Symposium Call Centers.

node

A single call center location. One of four possible sources of statistics.

position

See agent position ID.

service level

The percentage of incoming calls answered within a specified amount of time (for example, 30 percent of calls answered within 15 seconds).

skillset

A label applied to a set of skills, capabilities, or knowledge that may be required of an agent to respond to a given call. Agents are assigned to skillsets, and calls are routed according to skillsets.

stand-alone

When you install the Symposium GRTD on a computer that does not have a Symposium Call Center client installed, it is referred to as a "stand-alone" installation.

standard collections

While you can customize the Symposium GRTD, you can also use the two default collections.

Standard collection 1

The Management Summary collection provides an overview of the call center activities. This screen is ideal for viewing by the call center manager or supervisor. The information is displayed on either a client PC or a flat panel VGA monitor (to replace a wallboard).

Standard collection 2

The Waiting and Calls Offered by Application collection provides call status activity. Information such as the total number of calls waiting and the total number of agents is displayed in a graphical format. You can define the format. The default setting is a vertical bar chart.

Symposium Call Center

Term used by this guide to refer to Symposium Call Center Server Release 1.1 and Release 1.5, and the Symposium Express Call Center Release 1.0.

Symposium GRTD

Nortel Networks Symposium Call Center Graphical Real-Time Display.

Symposium GRTD window

The main window for the GRTD application.

time chart period

The width of the time chart axis. The minimum value you can enter is 0.5 hours. The maximum value is 120 hours (5 days). The time chart contains 300 data points. If you set the time chart period to 0.5 hours then each point will represent the average value over the previous 6 seconds. If you set the period to 120 hours then each point will represent the average value over the previous 24 minutes.

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